

Proposal Briefing (due Monday, May 5)

Instructions

<ul style="list-style-type: none">• Each team will have 30 minutes (which includes time for questions)• Send materials before class and arrive on time• Send your presentation only in PDF form to the entire class AND bring handouts• Send all your materials in a ZIP file to the instructor (late materials will be counted as zero credit).	<ul style="list-style-type: none">• Prior to the presentation, questions are encouraged via email at any time. However, the CEO's time is valuable so make sure you investigate your concern first and state your question clearly and succinctly.• Providing an example of what you have already done is your best method to getting a solid answer.
---	--

Overview

The CEO of ArchiSurance is looking to grow his company. While his management team is focused on the near term task of realizing merger synergies through post-merger integration, he's looking for more. You had an opportunity to present an overview of the combination of banking with insurance products (also known as 'bancassurance') in an earlier engagement and you've been asked back to work on a new challenge. Since that time ArchiSurance has progressed through a lot of work for their post-merger integration of multiple insurance companies.

ArchiSurance's progress is described in the case study. They've moved all the way up to what is described as "Scenario 2" in the case study and they are looking for proposals on how to proceed.

Your task is to develop architecture models and a presentation explaining your recommendations for both addressing the desired items in scenario 2 as well as how these can be addressed for both the insurance and banking products. You may expand on your earlier presentation where appropriate, but you need to address some specific deliverables as well.

Develop a story of how to address Scenario 2 and include the banking products and/or operating model as needed (note that the case study only addresses insurance). Include this throughout your presentation. You may support this with materials you previously investigated or add new ones as you feel appropriate.

Develop a model to address Scenario 2 and include these views:

1. Organizational view
2. Business process view
3. Application usage view

Assume the target architecture from Scenario 1 is the new baseline for your target. You begin with this baseline and define a new target for Scenario 2 (for reference, see figure 17 and figure 23 in the case study).

Deliverables

1. **[10%] Research Notes.** Send these as Adobe PDF as part of your combined ZIP file submission prior to class.
 - a. Prepare for your presentation by making research notes – details and background about what you discover that will help your team prepare both the presentation as well as respond to questions. You will be required to submit these notes typewritten form as Adobe PDF as part of your completed assignment.
 - b. Specifically rewrite the Scenario 2 portion of the case study (what is on page 29) to include your view of what is to be included to make it cover both insurance and banking. What you define here should appear in your other results.
2. **[20%] Models.** Provide the Archi file for your model(s). Include documentation (using the Archi tool) for your modeling elements. Send this model file in the combined ZIP file with everything else directly to the instructor prior to class (do not show up late or send this late as it will not be accepted late). Also provide a report of your Archi model as a PDF in the ZIP file.
3. **[60%] Presentation.** Send this (and only this piece) as a PDF to the entire class prior to class starting on the due date. Bring printed handouts as well. Include a copy in the ZIP file to the instructor. Practice! Making a set of slides is only part of the work. Choose which team member will present for you carefully (it should NOT be the team member who presented in earlier engagements). Provide a PowerPoint or Adobe PDF presentation file with speaker notes sufficient for your presentation time. Note, this will likely require less than 1 slide per minute and you should practice and time your presentation so as not to be short or long on time. Assume that you are preparing the file to be delivered by your consulting firm's salesperson so it should be easy to understand and clearly documented (however you will also make the presentation). Your job for the presentation is to simplify and organize your research and modeling efforts to tell a story. You may find it easier to use portions of your models on slides rather than entire diagrams to make a specific point more visible and easy to understand.

Review and follow the Executive Presentation rubrics on the class website (these are the same as from your prior group assignment).

See the list on the Assignment 8 page ... Executive Presentation Rubrics

4. **[10%] Meeting Notes.** Include this in Adobe PDF format in your combined ZIP submission. You should have one teammate capture notes for you during your presentation. You will be required to submit these notes typewritten form in Adobe PDF as part of your completed assignment. You will submit these notes at the end of the class when the presentation occurs. Make these complete to include questions/answers as well as audience response to the materials. The person who did not present in either the earlier briefing or this one should be the note taker.